

## **Business Intelligence Grievance Detail Agency Report via Portal**

<b>Purpose</b>	Use report to easily obtain detailed grievance data based on selection criteria. Provides more detail than Grievance Details Report in that it shows all detail for each grievance (e.g. all five possible Articles not just primary). Report breaks by agency (business area) when run statewide. A grievance may appear in multiple rows in order to show all detail information, but only the most current step in the process is reported. Due to size, consider exporting the report to Excel to better organize data as desired.
<b>Trigger</b>	Unique requests for data on grievance counts or activity, the need to audit data entries, GMAP preparations.
<b>Prerequisites</b>	You have grievance data entered into HCM and within six months of receiving system access you have successfully participated in Grievance Tracking training.
<b>End User Roles</b>	In order to perform this transaction you must be assigned the following role with reporting access: Decentralized Grievance Administrator Decentralized Grievance Inquirer

<b>Change History</b>	
<b>Date</b>	<b>Change Description</b>
July 24, 2012	Created.
February 5, 2013	Corrected the link in the menu path

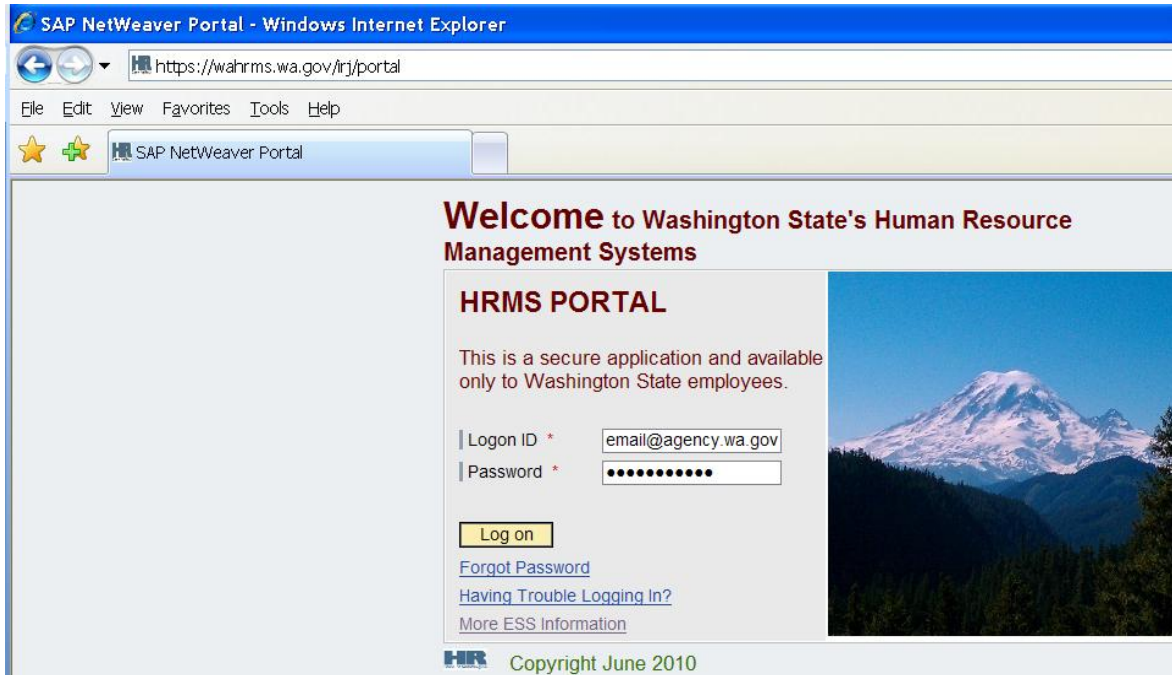
**Menu Path**      <https://wahrms.wa.gov/irj/> → BI Reports → Grievance Reporting → Grievance Detail Agency Report

**Transaction Code**    NA

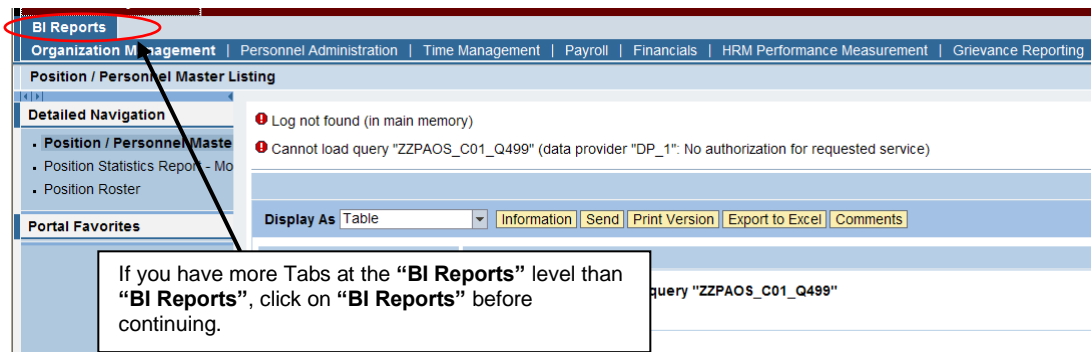
**Helpful Hints**      Further instructions on BI Report features are available under BI Training materials, including the “BW/BI Grievance InfoCube” Self-Paced Learning Materials.

## Procedure

1. Go to the Portal using your normal Production link: <https://wahrms.wa.gov/irj/portal> . Sign onto “BI Reports” by entering your “User ID” (your complete state agency e-mail address) and your “Password” (your state agency network password). Press the “Enter” key or click on the “Log On” button.



2. The screen you see next will vary depending on your security access. You should see a Tab that says, “BI Reports” with other Tabs under it. If you have more Tabs at the “BI Reports” level, make sure that you have the “BI Reports” Tab selected.



- Under “BI Reports”, click on “Grievance Reporting”. Your screen should look similar to the one below. It will default to the top report selection in the “Detailed Navigation” window on the left. In this case, it is “Grievance Detail Agency Report”.

Click on “Grievance Reporting” to find the Grievance Reports Section.

Once you are in “Grievance Reporting” click on the desired Grievance Report in the “Detailed Navigation” Section.

Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		

- To run “Grievance Detail Agency Report”, click on it, if it isn’t already in bold. You will see the selection screen below.

Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Date Filed		
Grievance Close Date		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance #		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Sub-Art #1		
Sub-Article Name 1		
Addtl Discipline Reason 1		

- Of the fields that appear on the Selection Screen, only the “Report Date Range” field requires an entry. Enter a valid date range to restrict the report results to a specific time period. To do this, click on the small square on the right side of the “Current Selection” box for “Report Date Range”. A popup menu will appear allowing the entry of a date range (see below).

## Title: Business Intelligence Grievance Detail Agency Report via Portal

**BI Reports**  
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | Grievance

**Grievance Details Report**

**Detailed Navigation**

- Grievance Details Report
- Grievance Master Agreement
- Grievance Totals by Agency
- Grievance Articles Trend Report
- Grievance Detail Agency Report
- Grievance History Report
- Grievance Status Totals Report

**Portal Favorites**

There are no items to display

**Variable Entry**

Available Variables: [Dropdown] Save

General Variables	Current Selection	De
* Report Date Range		<input checked="" type="checkbox"/>
Contract Year		<input type="checkbox"/>
Orig Agency Code		<input type="checkbox"/>
Orig Personnel Area		<input type="checkbox"/>
Orig Bargaining Unit		<input type="checkbox"/>
Grievance Status		<input type="checkbox"/>
Step		<input type="checkbox"/>
Master Agree		<input type="checkbox"/>
Article #1		<input type="checkbox"/>
Article Name		<input type="checkbox"/>
Addit Disciplin		<input type="checkbox"/>

OK Check

**Select values for Report Date Range**

Show view: Value ranges

Sign: Include

Operator: between

From: \*

To: \*

Enter an interval for Close Date:

OK Cancel

**Callout 1:** Click the square here to bring up the menu for entering the Date Range.

**Callout 2:** Date Range menu (all date menus may reference the "Close Date" in various spots – please ignore this, it is a software glitch; the description should be for the menu you selected.)

- Click on the square on the right side of the "From" box to get to the "Calendar" menu (see below).

**Calendar selection menu appears. Note references to "Close Date" again. Please ignore these and assume that it is referring to Report Date Range "From" date.**

**Select values for Close Date (ZS\_GRIEVANCECLSDT 0003)**

Show view: All

May 2009 June 2009

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
18	26	27	28	29	30	1	23	31	1	2	3	4	5
19	3	4	5	6	7	8	24	7	8	9	10	11	12
20	10	11	12	13	14	15	25	14	15	16	17	18	19
21	17	18	19	20	21	22	26	21	22	23	24	25	26
22	24	25	26	27	28	29	27	28	29	30	1	2	3
23	31	1	2	3	4	5	28	5	6	7	8	9	10

July 2009 August 2009

27 28 29 30 1 2 3 4 31 26 27 28 29 30 31 1 28 5 6 7 8 9 10 11 32 2 3 4 5 6 7 8

**Callout 1:** Click the square here to bring up the Calendar selection menu for entering the "From" or "Start" Date.

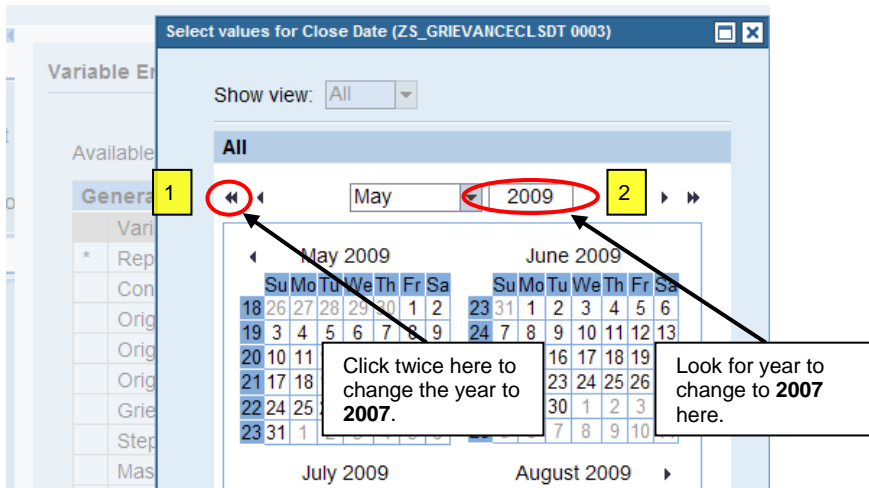
**Callout 2:** Select values for Close Date (ZS\_GRIEVANCECLSDT 0003)

Show view: Value ranges

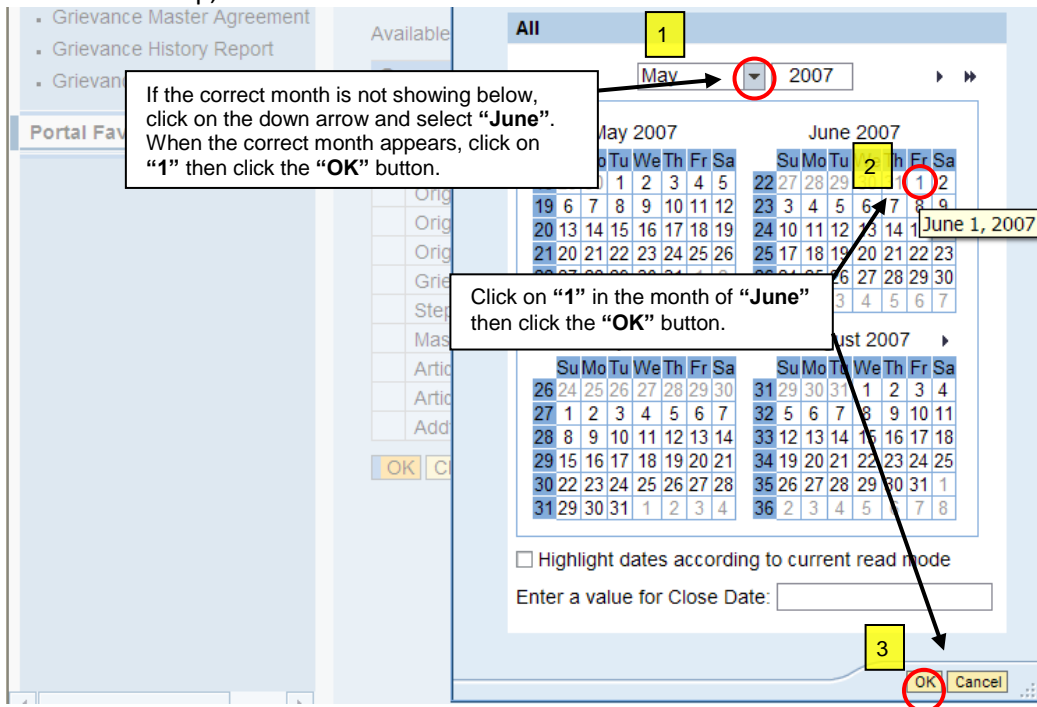
To: \*

Enter an interval for Close Date:

- In this example, we are going to use the "Report Date Range" of June 1, 2007 to June 15, 2007. To enter the "From" date of June 1, 2007, click twice (waiting for the screen to refresh after each click) on the double left arrow to change the year to 2007 (see below).



8. Since the month of June is already showing as one of the four months on the menu, you can just click on "June 1st" then click the "OK" button. Otherwise you could click the down arrow for month at the top, select "June" and click on the "1st".



9. You should see the "From" box filled in with 06/01/2007 (your settings may be formatted for DD/MM/YYYY, so you may see 01/06/2007).

10. You have the option of repeating the same instructions for the “To” date (June 15, 2007), or you can type the date in directly following the same format as the “From” date. You should see the screen below. When it is filled out correctly, click the “OK” button.

11. The screen will return to the original selection screen with the “Report Date Range” filled in. At this point, you may make additional selections using the other fields on the selection screen to further narrow the selected data returned. Once the report is run, you will also be able to apply “filters” on these fields and others to refine the data even more.
12. When you are finished selecting any other criteria, click on the “OK” button to see your report.

**BI Reports**  
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measure

**Grievance Detail Agency Report**

**Detailed Navigation**

- Grievance Details Report
- Grievance Master Agreement
- Grievance Totals by Agency R
- Grievance Articles Trend Rep
- Grievance Detail Agency R**
- Grievance History Report

**Portal Favorites**

**Variable Entry**

Available Variables:  Save Save As... Delete Show Variable Personalization

Variable	Current Selection	Description
* Report Date Range	06/01/2007 - 06/15/2007	06/01/2007 - 06/15/2007
Contract Year	<input type="checkbox"/>	
Date Filed	<input type="checkbox"/>	
Grievance Close Date	<input type="checkbox"/>	
Orig Agency Code	<input type="checkbox"/>	
Orig Personnel Area	<input type="checkbox"/>	
Orig Bargaining Unit	<input type="checkbox"/>	
Grievance #	<input type="checkbox"/>	
Grievance Status	<input type="checkbox"/>	
Step	<input type="checkbox"/>	
Master Agreement 1	<input type="checkbox"/>	
Article #1	<input type="checkbox"/>	
Article Name 1	<input type="checkbox"/>	
Sub-Art #1	<input type="checkbox"/>	
Sub-Article Name 1	<input type="checkbox"/>	
Addtl Discipline Reason 1	<input type="checkbox"/>	

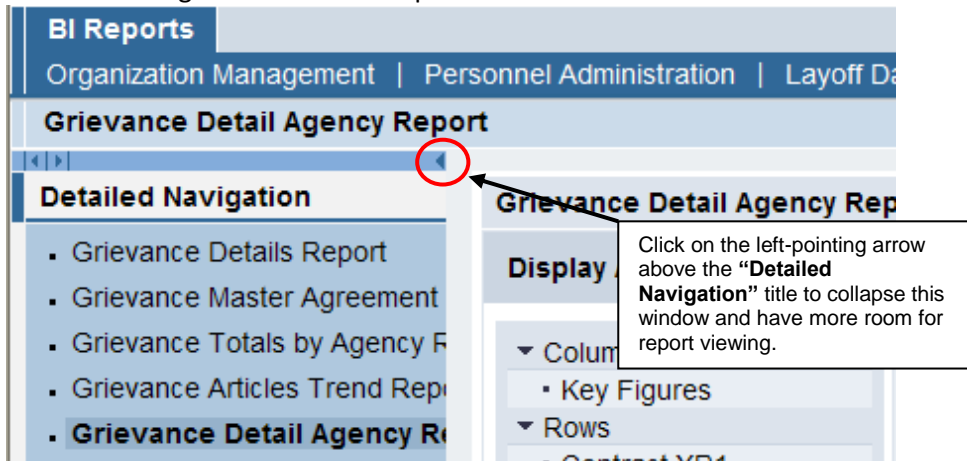
OK Check

13. The “Grievance Detail Agency Report” should appear on your screen, similar in appearance to the screen below. Because you are seeing one line of detail for each grievance record, this type of report is called a “detail” type report. Before you can use the report, however, you **must** add the “Closed Date” filter.

The screenshot shows the BI Reports portal with the 'Grievance Detail Agency Report' selected. The 'Detailed Navigation' pane on the left lists various report options, with 'Grievance Detail Agency Report' highlighted. The main report area displays a table of grievance records. The table has columns for Contract YR1, Master Agreement1, Orig Agency Code, Orig Pers Area, and Orig BU Code. The data is organized into rows, with each row representing a grievance record. The table is currently displayed as a table, with options to switch to Information, Send, Print Version, Export to Excel, or Comments.

Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area	Orig BU Code
07-09	IFPTE L17	4050	Department of Transportation	00SR
	WFSE	4610	Department of Ecology	00J2
		3000	Dept of Social & Health Serv.	00JE
		4900	Dept. of Natural Resources	00HM
	WPEA	4770	Department of Fish & Wildlife	00PE
05-07	Coalition	4770	Department of Fish & Wildlife	00MN
		2350	Dept of Labor & Industries	00MC
		3000	Dept of Social & Health Serv.	00JK
	IFPTE L17	2400	Department of Licensing	00SE
		4050	Department of Transportation	00SC
		4050	Dept of Transportation	00SP

14. You can get more room for report viewing by clicking on the left-pointing arrow just above the “Detailed Navigation” title to collapse the window.



15. Your screen should now appear without the “Detailed Navigation” window. You may bring back the “Detailed Navigation” window at any time by clicking on the right-pointing arrow on the left edge of the screen, between the two “Grievance Detail Agency Report” titles (see below).

The screenshot shows the BI Reports portal with the 'Grievance Detail Agency Report' selected. The 'Detailed Navigation' window is expanded, and the right-pointing arrow on the left edge of the screen, between the two 'Grievance Detail Agency Report' titles, is circled in red.

Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area
07-09	IFPTE L17	4050	Department of Transportation
	WFSE	4610	Department of Ecology



16. Right-click on “Closed Date” in the “Rows” area on the left side of the screen. In the popup menu, move the mouse pointer over “Filter” and click on “Select Filter Value” from the sub menu (see below).

**BI Reports**  
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | **Grievance Reporting**

**Grievance Detail Agency Report** | History | Back

Display As: Table | Information | Send | Print Version | Export to Excel | Comments

**Columns:** Contract YR1, Master Agreement1, Orig Agency Code, Orig Pers Area, Orig BU Code, Article Name1

**Rows:** Contract YR1, Master Agreement1, Orig Agency Code, Orig Pers Area, Orig BU Code, Article Name1, Sub-Article Name1, Date Filed, **Closed Date**, Close Reason, Grievance Step, Grievance Employee, Free Character, Addtl Discipline, Addtl Discipline

Right-click on “Closed Date”

Move the mouse over “Filter” & click on “Select Filter Value”.

Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area	Orig BU Code	Article Name1
05-07	TE L17	4050	Department of Transportation	00SR	Engnring Techs
	SE	4610	Department of Ecology	00J2	Agencywide
		3000	Dept of Social & Health Serv.	00JE	Econ/Social Svcs
			3025	00JE	Econ/Social Svcs
			Dept. of Natural Resources	00HM	Residual NonSup
			Department of Fish & Wildlife	00PE	Biology BU1
			Department of Fish & Wildlife	00MN	Biology BU2
					Entire Agreement
		2350	Dept of Labor & Industries	00MC	IBEW Elec Insp
		3000	Dept of Social & Health Serv.	00JK	Physicians
		2400	Department of Licensing	00SE	Fsci Mgt Anlyst
					Past Practice
				00SC	Lic Srvc Rep
		4050	Department of Transportation	00SP	Engnring Svcs
					Discipline

17. The “Closed Date” Filter menu will appear on the screen. This is the beginning of the “Close Date” filter process. You will have to apply two “Close Date” filters every time you run a Grievance report in BI to get accurate results.
18. Click on the “Show tool” dropdown menu and select “Value Ranges” (see below)

Select values for Close Date (ZGRVCLDT)

Show tool: Single values | Show view: All

All | Single values | **Value ranges** | Selections

June 2009 | July 2009 | August 2009 | September 2009

23 31 1 2 3 4 5 6 | 27 28 29 30 1 2 3 4 | 31 26 27 28 29 30 31 1 | 32 2 3 4 5 6 7 8

24 7 8 9 10 11 12 13 | 28 5 6 7 8 9 10 11 | 29 12 13 14 15 16 17 18 | 30 19 20 21 22 23 24 25

25 14 15 16 17 18 19 20 | 29 12 13 14 15 16 17 18 | 30 19 20 21 22 23 24 25 | 31 26 27 28 29 30 31 1

26 21 22 23 24 25 26 27 | 30 19 20 21 22 23 24 25 | 31 26 27 28 29 30 31 1 | 32 2 3 4 5 6 7 8

27 28 29 30 1 2 3 4 | 31 26 27 28 29 30 31 1 | 32 2 3 4 5 6 7 8 | 33 9 10 11 12 13 14 15

28 5 6 7 8 9 10 11 | 32 2 3 4 5 6 7 8 | 33 9 10 11 12 13 14 15 | 34 16 17 18 19 20 21 22

August 2009 | September 2009

31 26 27 28 29 30 31 1 | 36 30 31 1 2 3 4 5 | 37 6 7 8 9 10 11 12 | 38 13 14 15 16 17 18 19

32 2 3 4 5 6 7 8 | 37 6 7 8 9 10 11 12 | 38 13 14 15 16 17 18 19 | 39 20 21 22 23 24 25 26

33 9 10 11 12 13 14 15 | 38 13 14 15 16 17 18 19 | 39 20 21 22 23 24 25 26 | 40 27 28 29 30 1 2 3

34 16 17 18 19 20 21 22 | 39 20 21 22 23 24 25 26 | 40 27 28 29 30 1 2 3 | 41 4 5 6 7 8 9 10

35 23 24 25 26 27 28 29 | 40 27 28 29 30 1 2 3 | 41 4 5 6 7 8 9 10 | 42 5 6 7 8 9 10 11

36 30 31 1 2 3 4 5 | 41 4 5 6 7 8 9 10 | 42 5 6 7 8 9 10 11 | 43 6 7 8 9 10 11 12

☐ Highlight dates according to current read mode

Enter a value for Close Date: \_\_\_\_\_

Add | Remove

Change Order



19. The screen should change to the one seen below. Click on the dropdown menu for “Operator” and select “Greater or equal”.

[illegible]

20. In the “From” field, type the date you used in the “Report Date Range” “From” field (i.e. the “Start” date of your selection range (see item 9 of these instructions)). The date may also be entered by clicking on the square at the right end of the field and selecting from the calendar menu (see item 6 of these instructions). For the example shown in these instructions, the “From” date is June 1, 2007.

[illegible]

21. Now that you have selected the “Operator” and the “From” date, the filter needs to be migrated to the “Selections” window on the right side. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the date will appear in the “Description” column and the “Operator” will appear in the “Type” column. In the screen below, the migration has already occurred.

The screenshot shows a window titled "Select values for Close Date (ZGRVCLDT)". On the left, under "Value ranges", the "Sign" is set to "Include", the "Operator" is "Greater or equal", and the "From" field is empty. On the right, under "Selections", there is a table with two columns: "Type" and "Description". The first row shows "≥" in the "Type" column and "06/01/2007" in the "Description" column. Red dashed arrows point from the "Sign", "Operator", and "From" fields in the "Value ranges" section to the corresponding cells in the "Selections" table. A yellow box with the number "2" is placed over the "Add" button, which is a right-pointing arrow. A text box with an arrow pointing to the "Add" button states: "The 'Add' arrow was clicked to migrate the date and operator." Another text box with an arrow pointing to the "Selections" table states: "Date, Operator, & Sign migrate to the 'Selections' window." The "Add" button is circled in red.

22. Using the same screen, it is time to add the second filter. This filter will always be the same for the “Closed Date”. Its purpose is to ensure that all records without a “Closed Date” are included (i.e. all records with an Open, Pending, or Bypass status).
23. Click on the dropdown menu for “Operator” and select “Equal” and instead of typing in a date in the “From” field this time, type a “#” (uppercase “3” on the keyboard), without the quote signs, into the “From” field (see below).

The screenshot shows the same window as before. In the "Value ranges" section, the "Operator" dropdown menu is open, showing "Equal" selected. The "From" field now contains the character "#". A text box with an arrow pointing to the "Operator" dropdown menu states: "Select 'Equal' from the 'Operator' dropdown menu." Another text box with an arrow pointing to the "From" field states: "Type '#' (without the quote signs) into the 'From' field". The "Add" button is still circled in red. The "Selections" table now has two rows: the first row has "≥" in the "Type" column and "06/01/2007" in the "Description" column, and the second row is empty.

24. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the “#” will appear in the “Description” column and the “Operator” will appear in the “Type” column. The screen below shows the “Operator” and “#” after migration. To accept both filters you have created, click on the “OK” button.

## Results

The Grievance Detail Agency Report should refresh on your screen with less data than before. Scroll all the way to the right of the report. You will now be able to see that the “Closed Date” filters you just applied are working correctly (see below).

BI Reports									
Organization Management   Personnel Administration   Layoff Data   Time Management   Payroll   Financials   HRM Performance Measurement   Grievance Reporting									
Grievance Detail Agency Report									
Article #1	Sub-Article Name1	Sub-Art #1	Date Filed	Close Date	Close Reason	Grievance Status	Step	Grievance #	
5	Not assigned	#	04/25/2007	12/21/2007	1 Withdrawn	2 Closed	3M	Step 3 Meeting	
09	Not assigned	01	05/29/2007	#	# Not assigned	1 Open	2R	Step 2 Response	
36	Not assigned	05	10/12/2007	#	# Not assigned	1 Open	PARMR	Pre-Arbitration Response	
27	Not assigned	#	03/28/2007	#	# Not assigned	1 Open	1M	Step 1 Meeting	
33	Not assigned	#	11/16/2007	12/21/2007	1 Withdrawn	2 Closed	1M	Step 1 Meeting	
30	Not assigned	#	04/30/2007	#	# Not assigned	1 Open	3R	Step 3 Response	
20	Tools and Equipment	02	05/07/2007	08/07/2007	1 Withdrawn	2 Closed	2R	Step 2 Response	
30	Not assigned	#	03/19/2007	10/15/2007	2 Settled	2 Closed	3M	Step 3 Meeting	
5	Not assigned	#	03/27/2007	07/25/2007	1 Withdrawn	2 Closed	2M	Step 2 Meeting	
26	Not assigned	#	03/05/2006	07/27/2007	2 Settled	2 Closed	3M	Step 3 Meeting	
			03/26/2007	#	# Not assigned	1 Open	3M	Step 3 Meeting	
26	Not assigned	#	02/09/2007	#	# Not assigned	1 Open	3R	Step 3 Response	
			03/12/2007	#	# Not assigned	1 Open	PARMR	Pre-Arbitration Response	
24	Not assigned	01	02/08/2007	11/26/2007	2 Settled	2 Closed	1M	Step 1 Meeting	
			06/11/2007	#	# Not assigned	1 Open	1R	Step 1 Response	
02	Not assigned	#	04/20/2007	08/09/2007	1 Withdrawn	2 Closed	2M	Step 2 Meeting	
10	Not assigned	#	05/24/2007	#	# Not assigned	1 Open	1R	Step 1 Response	
27	Not assigned	02	03/14/2006	11/09/2007	2 Settled	2 Closed	PARMM	Pre-Arbitration Meeting	
24	Not assigned	01	12/04/2006	11/08/2007	4 Incorp into other grievan	2 Closed	2R	Step 2 Response	
40	Not assigned	40	02/27/2007	07/24/2007	2 Settled	2 Closed	DD	Step 2 Response	